

A professional headshot of a bald man with a friendly smile, wearing a dark navy suit, white shirt, and a bright yellow tie. The background is a solid dark blue. The image is partially framed by a diagonal split between a medium blue and a white background.

INTRODUCING

Malcolm McDowell

Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Malcolm began his career in Financial Services back in 2001, cutting his teeth in the tough new world of Eastern Europe not long after the fall of Communism. Since then he has lived and worked in the Netherlands, Switzerland, the UAE and Germany. He is now based with his family permanently out of the UK.



Malcolm is a highly experienced senior financial adviser and portfolio management expert, and fully appreciates and understands the challenges and opportunities that face those who work overseas.

Within the changing world of wealth management, so much is now moving to the internet and social media and it is through these platforms that he now passes on his knowledge, helping his clients to manage and grow both their personal and pension portfolios.

Rapid and sustainable financial growth is his true passion. Getting life-changing advice into the hands of thousands of people and empowering them is his true calling and provides him with enormous gratification.

At Chase Buchanan he has the unique privilege to indulge in all of the above.

## WHAT MALCOLM'S CLIENTS HAVE TO SAY

### Andrew E.D. Garai

Chief Executive Officer, OTS, Zürich

I have been active as an entrepreneur in Zürich for several years and have recognised Malcolm McDowell to be a great help both personally and professionally.

Malcolm advised me on ways to release what appeared to be frozen assets from the UK and skilfully constructed in their transfer with no tax charge incurred. This has been a substantial help for my business during its start-up period.

Further, Malcolm is guiding me on how to take advantage of my expat-status for tax planning purposes, as well as advising on investments in volatile market conditions.

I have been very satisfied with Malcolm's services and attention and am happy to recommend him further.

Malcolm's knowledge areas spans a significant number of different subjects and so we've benefitted from holistic financial planning, instead of having to research the market ourselves. Indeed this saves a lot of time and energy.

David Lacy  
Zurich

### **Caterina Hatzifoti**

Publication Manager, Amgen Europe

Malcolm McDowell has a profound knowledge in personal finances and he delivers results even in challenging financial markets.

Malcolm takes time to fully explain his recommendations and has shown a lot of patience and understanding whilst sharing his ideas. This is very appreciated, since I am not working in the finance industry myself.

I can recommend Malcolm to anybody looking for bespoke personal investment advice and I wish him a lot of success.

### **Matt Wood**

CABOT

Prior to meeting Malcolm McDowell I already had several financial advisers but Malcolm really differentiated himself in his expertise on UK pensions.

Malcolm has helped me take control and get the dormant pension assets I had left in England growing again, and I've been really impressed with the efficiency and professionalism of the process.

Malcolm has shed light upon some disturbing deficiencies of the current UK pension system and I am really glad to have met him. I wholeheartedly recommend his advice.

### **Geoff Pearson**

IT Citrix Engineer, Glencore

I have been working with Malcolm for almost a year now after first assessing my pension planning needs. It is early days and there is still a long way to go, but he has provided highly informed advice, given me new insights into my needs and capabilities and has allowed me to make successful provisions for the future. The value of my QROPS pension assets is increasing at a better rate than if I had left them in the UK.

Throughout his time advising me, Malcolm has taken all the hassle out of my pension so I can concentrate on more exciting things.

### **Tony Faulds.**

Fleet Operational and Technical Support Manager,  
Wartsild Switzerland Ltd.

Malcolm McDowell has provided invaluable help with both my ongoing investments and my retirement planning. I find him to be thorough, professional and sensitive toward my specific requirements and issues. He is most knowledgeable in the field of UK pensions, which is of great benefit for good planning in today's economic climate.

I would recommend Malcolm McDowell to anyone seeking financial advice, be it for the short- or longer term.



Below are some of Malcolm's specialities:

- > Expert in Portfolio Management
- > Expat Pensions Specialist in Europe and Canada
- > Irish Pensions Specialist with on-going relationships at Irish Revenue
- > US Situs Assets Estate Tax
- > Customer service specialist
- > Trainer of financial consultants and financial planners

Why people book face to face and Zoom meetings with Malcolm

- > Global perspective – Worked as financial advisory in 7 countries with clients in 28 countries
- > Sharing the latest investment tips and technologies
- > Fun and Interactive
- > Easy to work with – no demands
- > Clients love him – take a look at the LinkedIn testimonials

... His investment advice is sensible and fair, and even in the current challenging conditions Malcolm has grown our savings and ring-fenced our assets from the tax man.

David Lacy  
Zurich

Malcolm McDowell  
Private Wealth Manager  
chasebuchanan.com

Malcolm is qualified to advise in all facets of personal financial planning including:

Retirement planning

Lump sum savings

Investment planning

Education fee planning

Critical illness and family protection

QROPS and SIPPS

## About Chase Buchanan Ltd

Chase Buchanan retains its independence through private ownership, so no bank, insurance company or financial institution influences the products we offer or the advice we give, we work purely in the interest of clients.

We strive to provide the best level of service in the industry which means having the right regulations, the right structure and the right people.

Our mission is to help our clients plan for their future and provide insight and advice that enables them to achieve their life goals. We provide clear, unbiased, jargon-free advice and unparalleled ongoing support and reviews.

Malcolm welcomes anyone with an interest in creating a financial plan, or anyone with existing plans in place in need of review, to contact him directly:

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# Trusted advice made simple

TALK WITH MALCOLM

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